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ABSTRACT

This document looks at educational reform related to teacher incentives policy through legislative and state education agency perspectives. It includes an overview of national issues pertaining to teacher incentives, a narrative report on the status of teacher incentive policies in the seven state region serviced by the North Central Regional Educational Laboratory (NCREL), and a summary of the discussion of a panel of state legislators and state education agency representatives in the NCREL region. Perspectives on impetus, implementation, evaluation, and future directions are included in the panel discussion. (Author)

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Summary of Presentation: Legislative and State Education Agency Perspectives on Teacher Incentive Policy

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Abstract for Submission to E.R.I.C

Legislative and State Education Agency Perspectives on Teacher Incentive Policy

presented at the 12th Annual Meeting
National Council of States on Inservice Education
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San Diego, California

This document looks at educational reform related to teacher incentives policy through legislative and state education agency perspectives. It includes an overview of national issues pertaining to teacher incentives, a narrative report on the status of teacher incentive policies in the seven state region served by NCREL, and a summary of the discussion of a panel of state legislators and SEA representatives in the NCREL region. Perspectives on impetus, implementation, evaluation, and future directions are included in the panel discussion.

Dr. Carol Bartell (The University of the Pacific) began the presentation after being introduced by convener Nancy Eberhart. Bartell presented an overview of issues pertaining to teacher incentives. Data substantiating the need for policies to foster teacher incentives was provided, along with a discussion of the distinction between incentives and disincentives. As a focal point, Bartell presented a conceptualization of incentives for teachers, developed for her work on incentives with the North Central Regional Educational Laboratory. Incentive policies can be categorized by their intent into four
general groupings:

- recruitment, as both a quality and a quantity issue;
- retention of teachers;
- fostering motivation to improve performance; and
- enhancement of the teaching profession.

Incentives can be considered in terms of the type of motivator selected to satisfy a particular need. These can be grouped into five broad categories:

- monetary benefits;
- improved conditions in the workplace;
- career status;
- awards and recognition; and
- enlargement of responsibilities.

A matrix configuration which cross-references these motivators with the intents was presented. Bartell discussed each of these intents and motivators for incentives, and explained how the matrix could by a useful tool in developing incentive policies.

Arthur Dorman (NCREL) provided a narrative report on the status of teacher incentive policies in the seven-state region served by NCREL. Dorman delineated factors throughout the region which have contributed to a regional context regarding incentives for teachers. These conditions include stumbling economies which have not benefitted from the national recovery, a decade-long trend toward declining enrollments, a steady increase in the numbers of new teachers hired (in large part due to the growing number of teachers retiring), and a strong tradition of local control vested in the local education agencies.

Dorman continued with the types of incentive programs found to be common throughout the seven NCREL states of Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio and Wisconsin. These include programs to recruit teachers into market-sensitive areas, such as mathematics, physical science, computers and special education; programs to recruit teachers into the most rural and most urban areas of the region; more stringent criteria for entry into the teaching profession (this can create increased professional status for teachers, which can serve as an incentive); mentor programs to offer support to new teachers while providing veteran teachers with role diversification; and increased access to professional development activities. Following this, Dorman listed the primary reform measures with impact on teacher incentives in each of the seven states.

To conclude, Dorman presented the findings of a survey conducted by NCREL of Local Education Agency incentive activities, and speculated on the nature of the interface between state and local activities in each of the seven states. In some cases SEA and LEA activities were seen to compliment each other, while in others they appear to address different sets of needs.

The program continued with a panel discussion moderated by Nancy Fulford (NCREL). Fulford introduced each of the four panel members: Carol D'Amico, from the Indiana State Education Department; Nancy Eberhart, from the Ohio State Department of Education; Senator Steven Johnson, serving in the Indiana State Senate; and Senator Richard Varn, of the Iowa State Senate.

The panel was to focus on three general areas of discussion as they relate to policy issues for teacher incentives: the impetus for state-level intervention in setting policies, the role of state authorities (both in legislative and administrative bodies) in implementing and evaluating programs, and future directions for the states in charting policies. Including both the legislative and administrative perspectives, and allowing discussion of how legislative policies became implemented through administrative activities were important features of the panel's design.

Senators Varn and Johnson each provided a scenario of the circumstances which led to passage of major education reform legislation (including incentives for teachers) in their respective states. In both cases, the development of broad-based coalitions representing varied interests were cited as being critical.

Eberhart observed that in Ohio reform has been spearheaded by local district initiatives, rather than state efforts. Certain LEAs have petitioned directly to the state legislature for funding to develop their own plans. State leadership has focused mainly on charting directions for the professional growth of teachers.

The discussion moved into Varn's perception of educational reform as "damage control", attempting to correct social problems, then to fix the problems caused by the first corrective measures. Johnson concurred that such perceptions of troubled schools have in themselves been a disincentive for teachers, with public confidence in their performance being eroded. D'Amico pointed out that some of the most powerful incentives offered in Indiana's reform package are ways of supporting the teachers in getting their jobs done.

The panel discussed proper arena for the generation of policies, with the notion of tapping a "blue ribbon panel" of experts. The consensus seemed to be that the state's role was to identify problems and convene bodies to suggest solutions, rather than to develop solutions themselves. Johnson pointed out that state legislatures can deal only with the general policy issues, and are not able to address the particular concerns of local educational agencies.

Issues which affect the implementation of state policies were discussed, including the changing role of state education agencies from one of advice- giver to regulatory agency to change agent; the importance of periodic review or "sunset clauses" to insure that programs are maintaining their usefulness; and the dilemma faced when inadequate funds are allocated to properly enforce state regulations.

The two state senators revealed their perceptions of where state legislatures in general were heading in terms of the teacher incentive issues, and spoke of a limited "window of opportunity" for states to intervene in addressing some of these issues.

A discussion of the balance between state intervention and local district control followed. Eberhart and D'Amico, both from the perspective of the SEAs, considered the role of the state agency to be one of providing a framework and the resources with which local districts could deal with the issues. Johnson spoke of an ebb and flow between local and state initiatives as issues become more or less critical parts of the state-wide agenda, and Varn sees the state legislative role as one of forcing change when needed, leaving the state agency in the position of working with the local districts to implement the change and deal with its effects.

The panel concluded with a discussion of the need to remove some of the burdens that have been placed upon schools as the healer of social ills and give reform measures a greater chance of being successful, by encouraging schools to prioritize their needs and objectives. The question of whether the problem is schools' unwillingness to prioritize their objectives, or their not being able to because of external pressures was addressed.

Bartell closed the session by drawing together the content of the panel discussion in a brief summation.

Teacher Incentives in the NCREL Region: State Policies and Programs

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Prepared as a part of the presentation:
Legislative and State Education Agency Perspectives on Educational Reform on Teacher Incentives
at the Annual Meeting of the National Council of States on Inservice Education
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Incentives for Teachers: The NCREL Region

In political processes that force prioritization of needs in order to make the most effective use of limited resources, needs which appear to be more urgent or basic are likely to be ranked as higher priority items and hold more compelling arguments for garnering a share of the public dollars. At the same time, the perceived urgency of such a need is more likely to be met through directive state interventions than a need perceived as being less urgent. The amount of attention state policymakers pay to teacher incentives, then, can be expected to relate to the urgency of the types of incentives needed in that state.

In addition, it has been found that a strong force in determining the level of activity in educational reform among state legislatures is the culture of the legislative body as a distinct organization itself. Socioeconomic forces within states also have an effect upon the extent of legislative response to the educational reform agenda (Shinn and Van Der Slik, 1986). States within regions are likely to share all three of these elements: level of needs for teacher incentives, socioeconomic conditions, and organizational cultures of their legislative bodies. Hence, we could logically expect regions to "hang together" somewhat, in terms of the actions taken toward teacher incentives by their respective state legislatures. This tendency is most pronounced in the Southeastern region of our nation (Shinn and Van Der Slik, 1986) but can be observed in the North Central states as well.

An overview of the entire North Central Region reveals several common factors which affect all seven of these states and contribute toward a regional "profile" relative to teacher incentive policies and programs.

One consideration is that each of these states has experienced enrollment decline over the past decade. The declining birthrate of the 1970s, combined with a demographic shift of population from the Northeast and North Central states to the South and Southwest led to a prolonged downward trend in the numbers of students served by the region's schools. In the past three years this trend had diminished, and in two cases (Indiana and Minnesota) enrollments have begun to increase. Regionally, the number of students in K-12 public schools decreased from 8,602,791 in 1981-1982 to 8,142,435 in 1985-1986, a drop of 5.35 percent (Bartell, 1987b). In general, the shrinking numbers of students has enabled the region to avoid a teacher shortage. Thus, these seven states were not faced with a need to develop incentives aimed at merely drawing sufficient numbers of personnel into the teaching force.

However, despite the decline in enrollments in the North Central Region, the number of new teachers hired each year continued to rise -- from 18,106 in 1981-1982 to 225,465 in 1985-1986 (Bartell, 1987b). This is an increase of 40 percent. There are several explanations for this increase in hiring of teachers in the face of declining enrollments. One factor is the large number of teachers who have been reaching retirement age over the past several years. While estimates of the precise percentage of teachers on the verge of retirement vary, it is widely accepted as sufficient to create a significant number of teaching vacancies in the near future (Mitchell, 1985; NEA, 1983).

Another factor is the restoration of positions that were cut during periods of severe economic recession in the late 1970s. This has been seen especially in Michigan, a state which was forced to make severe program cuts and has begun to restore these programs as the economic picture has brightened. Furthermore, enrollment declines do not produce proportional declines in the teaching workforce, as there is a bottom threshold on the number of teachers needed to offer a comprehensive school program, regardless of the numbers of students in attendance. This is particularly true of secondary education programs. The impact of declining enrollments on the size of the teacher workforce is deflected, then, by reductions in class sizes.

An additional point to consider in examining the North Central Region is that the national economic recovery has not been felt to any significant degree by the states in the region. The agriculture sector and heavy manufacturing, such as steel production, automobiles and farm machinery -- both vital parts of the region's economy -- have been in severe and prolonged slumps. This has reduced income available to states while increasing the demand for public services. Improved performance by public education has been called for as one element in the struggle to regain economic vitality and restore a competitive edge in the international marketplace (The National Commission on Excellence in Education, 1983).

In considering the degree to which programs have been mandated by the states, we must recognize the strong tradition of local school board autonomy in all seven of the NCREL states. All of the states have local community rather than countywide school districts. The majority of the educational reform policies on the state level have, then, been designed to facilitate and encourage local action, rather than mandating specific programs to be locally implemented as written at the statewide level. The most obvious exception to this is teacher certification and renewal provisions, which generally have been considered the responsibility of state education agencies.

The concerns in the North Central Region have been shortages of qualified teachers in particular content areas (such as math, science, foreign language and special education), difficulty recruiting and retaining teachers in particular locations, such as inner-city neighborhoods and remote rural communities, and improving the caliber of performance by teachers already in service, usually as a means to achieve increased student achievement. Teacher education programs have been under scrutiny, as have teacher certification and recertification requirements, to establish more rigorous standards for those entering the profession. That this increase in standards can act as a form of incentive is observed in the experience of Kent State University, where the establishment of a selective and rigorous honors program in teacher education led to an increase in applications to the college of education (Shaklee, 1987). This type of policy most directly affects the area of enhancement of professional status, but acts as incentives for recruitment and performance as well. Related to this, six of the seven states have implemented or are in the process of implementing some form of standardized examination for teacher certification.

In fact, the question of sufficiency of the supply of teachers has a direct relationship to the restrictions on entry into the profession. Arthur Wise of the Rand Corporation stated:

> "How big the supply is depends on the definition of what a teacher is... You can create whole new pools of teachers instantly by dropping your requirements for the definition of a teacher, or changing the definition if suddenly you define any college graduate is a potential teacher, then you have a large new pool of teachers." (In Olson and Rodman, 1987).

The converse is surely true -- that is, as we raise the criteria for becoming a teacher, the pool of potential teacher applicants is going to become smaller and create the need for additional incentives aimed at recruitment of people who meet the criteria.

In recent years, the goal of increased performance has been a focus of incentive policies in most of the states in the region through a variety of programs to promote professional growth and improved effectiveness in teaching. Another recent trend is toward developing teacher induction or mentoring programs. These programs affect retention as well as performance. By allowing teachers themselves to be more responsible for the initiation of new members into their ranks and taking steps towards peer review, such programs, along with higher salaries for teachers, are expected to increase the status and stature of the region's teachers. This increase in the status of teachers is linked to the growing recognition of the role which education and educators must play in overcoming the economic stagnation which has beset the Region.

In summary, then, we find that the seven states in the NCREL Region share patterns of declining enrollments, with this trend lessening in all of the states; increased numbers of new teachers hired; continuing economic difficulties causing tax revenues to fall as the demand for social service programs increases and a tradition of local school district autonomy in most policy areas. We find statewide programs in most states to recruit people into critical content areas -- always including math and science, and sometimes including special education, computer instruction, foreign languages and reading as well. We also find state-level programs to promote professional growth and improvement activities in the local districts, and a growing number of programs aimed at helping new teachers with induction into the profession. States have been examining and in many cases raising the requirements for teacher preparation programs and certification, and establishing testing procedures for entry into the teaching profession.

Teacher Incentive Initiatives in the NCREL States

Specific reform programs that relate to incentives in each of the seven states in the region are cited below:

Illinois: Illinois funded a master teacher program in 1984-1985 that provided stipends of $1,000 to each of 500 teachers in the state. These teachers were expected to provide three days of professional service in exchange for the stipend. The program was not refunded, with difficulties in the selection process being one of the main problems.

In 1986-87, four school districts received funds to implement pilot incentive programs. The plans were locally developed, but had the common thread of rewarding superior effort, achievement, and/or leadership among teachers. Each program was required to have an institution of higher education as a partner to aid in program development, implementation, and evaluation.

Evaluation of the initial four pilot programs led to the conclusion that incentive plans that focus on additional pay for additional responsibility were most viable. As the study of the two pilot programs demonstrating this principle was successfully carried out, these two programs were not refunded by the state in 1987-88. The other two original pilot programs did received funding for a second year, and two new programs were picked up in 1987-88. Two of these programs focus on career ladders, one on teacher mentors, and one on performance-based pay.

In addition, Illinois had made available scholarships for students to enroll in teacher preparation programs in areas of critical need. These include mathematics, natural and physical sciences, reading, early childhood, bilingual education, English as a second language, social/emotional disorders, and speech and hearing disorders. Illinois also is undertaking efforts to recruit a greater number of minorities into teaching.

Indiana: Programs that Indiana had been funding prior to May of 1987 include the Teacher Quality and Improvement Pilots Project, which offered incentives to teachers through professional improvement opportunities, career ladders, and awards and recognition activities; Prime Time, a program that subsidized reduced class sizes in the primary grades, and acts as an incentive by increasing the potential for teacher efficacy; professional fellowships; a Teacher-of-the-Year program and tax incentives to encourage businesses to employ teachers during the summer months.

In May of 1987 the Indiana legislature approved an omnibus education reform act. Called "The A+ Program for Excellence in Education", it includes 26 reform initiatives, many of which are related to incentives for teachers, either directly or indirectly. The initiatives are grouped into three clusters: personnel, student, and school. Personnel items that seem to affect teacher incentives directly include establishment of an intern program for new teachers, a cadet teacher recruitment program, continuation of the Teacher Quality and Improvement Pilot Projects (described above), Japanese and Chinese teacher exchange programs, and loan forgiveness for minority students completing teacher preparation programs. The other two items in the personnel cluster, required staff performance evaluations (for schools to qualify for accreditation) and expansion of the Indiana Principals Academy, appear to affect teacher incentives indirectly. Regarding the latter, we can assume that principals who have had more training will do a better job of providing an environment that facilitates the work of the teachers.

Student-oriented reform items which affect teacher incentives are the addition of five instructional days to the school year (which brings additional salary to teachers), expanded summer school programs (creating summer employment opportunities) and programs that improve teachers' feeling of efficacy and being supported by offering services to at-risk students, as well as expansion of programs for gifted and talented students. An adult literacy measure may bring about increased support by parents as they gain in literacy skills. Indiana also will provide text books for low income children and has established a statewide achievement test, with required retention if remediation efforts do not succeed for those who do not meet the test criterion.

Establishing these standards can be an incentive for teachers if it encourages and motivates students, making them more eager learners.

School-based reform measures in the legislation include outcomes-based accreditation; rewards for school systems showing improvement in achievement, graduation rates, and/or attendance; and a program to increase parental involvement. All three of these are potential incentives for teachers in Indiana school districts.

Iowa: Iowa, too, passed major school reform legislation in May 1987: HF 499. The most striking aspect of this bill is the provision of $92 million for teacher salaries in Iowa. These funds are being distributed in three phases: 1) through the creation of a statewide minimum teacher salary of $18,000, 2) increased salaries for all teachers, to be distributed in accordance with negotiations between the LEA and the local bargaining units, and 3) funds for locally developed performance-based pay plans. It is this third phase of the salary funding that has created the most controversy. Districts must create new plans. They cannot use the funds to subsidize or supplant activities already in place. Programs had to be submitted to the Iowa SEA by January 1, 1988, for approval in order to be considered for funding during the first year of the program. Plans that include professional development, mentor teachers, and career ladders are among those being developed by LEAs.

Iowa also has a plan to repay student loans for the preparation of mathematics and science teachers, and to retrain teachers for credentials in those areas. New certification rules going into effect will eliminate the permanent professional class of certificate, requiring all teachers to engage in professional development activities of an approved nature in order to qualify for recertification. Those already holding the permanent professional certificate, however, will be allowed to keep it.

Michigan: Salaries in Michigan, on the average, have been among the highest in the nation. There has been concern, however, about the discrepancies in salaries offered by poorer and wealthier districts, with the poor tending to be located in rural or inner-city areas. Increased efforts have been made to recruit teachers particularly to those areas. Funds have been appropriated to offer retraining of teachers or loan forgiveness for new teachers in the areas of math, science, computer education, and instruction for middle schools.

One new development in Michigan is the requirement that continuing education credits be earned in order to meet recertification requirements.

A far-reaching report completed in October 1986 and entitled "Seizing the Opportunity: A Time for Commitment was prepared by the Future of Teaching Committee. Many recommendations made in this report would have a strong bearing upon teacher incentives, including possibilities of increasing salaries, establishing a technical assistance fund for teacher education, more rigorous standards in teacher education programs, and greater accountability by such programs in public colleges and universities, developing strategies to recruit people into careers in teaching, establishing an urban/rural school "Marshall Plan" to recruit teachers into those areas, involvement of teachers in statewide policy forums, career ladders and mentor teacher programs. At this time, the State of Michigan Department of Education has approved the report, but no legislative action has been taken.

Minnesota: Minnesota has not experienced any shortages of teachers, according to senior officials in the Minnesota Department of Education. In order to place enough teachers in more specialized fields in the outstate areas, districts have increased the sharing of personnel. One focus for school reform efforts in Minnesota has been the establishment of technology demonstration sites which would showcase teacher training, curriculum development and the use of technology in education.

In 1987 the Minnesota legislature approved appropriations in four areas related to teacher incentives. These include competitive grants to develop teacher mentorship, funds for local professional development, funding to increase educational effectiveness and an administrators' academy. The first two directly affect teacher incentives, while the second two have indirect effects.

Up to $50,000 per year for a two-year period will be available to up to five LEAs or coalitions submitting proposals for mentorship programs. It is expected that these mentorship programs would define new roles for teachers who participate in them.

Ten dollars per pupil unit will be available to LEAs that establish staff development advisory committees and adopt a staff development plan. This funding is of a categorical nature -- it must be spent to support the staff development plan. This is a reversion to an earlier policy in Minnesota regarding categorical funding for staff development which had been dropped for several years.

An additional new program in Minnesota has awarded planning grants for the establishment of teacher centers. Two such grants, of up to $75,000 each, were issued in the program's first year. The teacher centers must serve at least ten LEAs or 3,000 students. This program is administered by the Board of Teaching, which is responsible for teacher certifications in Minnesota and is distinct from the State Department of Education.

Ohio: Ohio has funded a program to address current and anticipated teacher shortages in selected areas -- both content areas, and geographical regions. The content areas initially identified to be included in this program were mathematics, foreign languages, and physical science. The geographic regions in need of teachers are the major urban centers and the 28 Appalachian counties of southeastern Ohio.

One major thrust in Ohio has been the establishment of entry-year internship programs, required in all districts as of July 1987. The state has encouraged the development of incentives in the LEAs using staff development and professional improvement models.

On a statewide level, Ohio teachers have a role in decision making through the Teacher Advisory Committee to the State Superintendent. To promote awareness and recognition of teachers accomplishments around the state, as well as to communicate information of interest to teachers, the Ohio Department of Education initiated in 1987 a publication entitled Teacher Update.

The Ohio legislature has provided special funding directly to the Toledo City Schools and the Columbus City Schools to fund programs for entry-year teacher assistance. These two cases are unusual in that the LEAs appealed directly to the legislature for financial aid, bypassing the SEA's involvement.

Other legislation under consideration includes the creation of a Professional Standards Board for teacher (and school administrator) certification, granting teachers permission to become members of the State Board of Education, permitting school boards to allow the children of full-time employees who live outside of the district to attend school in the district without paying tuition, and establishing school improvement councils in city, local, exempted village, and joint vocational school districts. Certain reforms in teacher retirement fund operations also have been proposed.

Wisconsin: The Teacher Incentives Pilot Program has been the main arena for incentive initiatives undertaken on the state level in Wisconsin. The program was an outgrowth of the report of the State Superintendents's Task Force on Teaching and Teacher Education, issued in January of 1984. The goal of the program is to pilot model programs which aim at one of four objectives: 1) incentives and innovations for training new teachers and for staff development; 2) incentives for retaining teachers in their profession through the development of career ladder structures; 3) incentives for retaining teachers through monetary and nonmonetary rewards; and 4) combinations which link the first three.

All school districts were eligible to submit proposals for pilot programs. Out of 34 LEAs which expressed an intent to apply, 17 did submit completed applications, and 8 were finally selected in February 1985. One requirement for the development of the proposals was that there be collaborative planning involving the local teacher association, the administrators, and the school board. Proposals needed to bear the signatures of the school board president, the LEA superintendent, and the teacher association president.

The eight pilot projects are now in their third year of operation and continue to receive state support, though at reduced levels. Assessment of the effectiveness of the programs thus far have led to a prioritization of incentive activities, with the number one priority being teacher induction activities, second being career ladders, and third being awards and recognition. Modifications in the projects have taken these prioritizations into account. Plans are now under way for the future dissemination of the results of the pilot projects throughout Wisconsin, though limited funding has slowed down these efforts.

In addition to the Incentive Pilot Projects, Wisconsin is supporting the renewal of the state level Future Teachers of America organization as a means of reaching out to high school students and recruiting them into the teaching field.

Trends in Local Education Agency Incentive Programs

A component of the NCREL study of teacher incentives is a survey of programs available in the region's local school districts. These results will be presented in detail in a document to be included in the NCREL series in incentives (Bartell and Dorman, forthcoming) and will not be repeated in this paper. However, it may be of interest to consider a summary of the findings in order to place the state policy interventions described above in the context of what local school districts do.

The NCREL survey of LEA incentive programs grouped programs according to the five types of motivators developed by Bartell in a background paper on teacher incentives for NCREL (Bartell, 1987a). The categories for the motivators are monetary incentives, conditions of the workplace, career status incentives, awards and recognition, and professional enhancement incentives. Table 1 below indicates the number of possible incentive programs included in each grouping, along with the mean number selected and the percentage selected out of those which were possible.

Table 1: Extent of use potential teacher incentive in LEAs

category	possible	mean	mean % cited
monetary incentives	14	6.30	45%
conditions of the workplace	17	10.57	62%
career status incentives	8	2.32	29%
awards and recognition	6	1.11	18%
professional enhancement incentives	11	5.85	53%

These figures indicate that local districts in this region are focusing most heavily on conditions of the workplace and professional enhancement sorts of activities. Monetary incentives maintain a high presence as well, but most of these were the "traditional" sorts of monetary benefits -- advancement on the salary schedule for years of experience and additional coursework, additional pay for coaching other co-curricular activities, additional salary for summer service, and so on. The more innovative practices, such as career ladders or performance-based pay were found in only a very small number of cases. The incentives that were commonly available out of the conditions of the workplace grouping were also of a more traditional nature, such as involvement in textbook selection, availability of preparation time, and health

insurance benefits. They relate to the individual's engagement with his or her work and environment. Incentives which involve new forms of engagement among teachers, such as peer evaluation or collaborative management, were, again, very infrequently reported.

Like the LEAs, the states have focused their efforts in establishing incentives on the areas of conditions of the workplace, professional enhancement, and monetary rewards, but in those cases the states have paid more attention to promoting what might be considered the innovative uses of aspects of those groupings, such as teacher mentors, career ladders, and performance-based salaries. It may be that it is the strategy of the state interventions to use those forms of motivation which the practitioner in the LEA is most accustomed to, but to promote less familiar, more innovative variations of those forms.

The awards and recognition and career status groupings are used to a lesser degree by both state and local agencies. It may be worth investigating the potential for making more effective use of incentives based upon these motivators.

Table 2: Above Average Incidence of Incentive Activities Available in LEAs in NCREL States

Activity	IL	IN	IA	MI	MN	OH	WI
early retirement	*				*		
extended year salary					*	*	*
base pay increase for performance					*		
salary differential in shortage areas			*				
paid sabbaticals				*	*		
flexible benefits				*			
amount of $ for health insurance				*			*
peer support groups			*		*		
peer evaluation					*		
part-time positions				*	*		*
job sharing				*	*		
aide support			*				*
secretarial support			*				
on site childcare				*			
wellness program			*				
personal coping support							*
position exchanges				*			*
salary increase for additional responsibility							*
awards				*		*	*
job exchanges with business & industry	*						
summer employment w/ business & industry	*						
instructional improvement grants				*		*	
mentor teachers		*				*	
tuition subsidy for advanced education						*	

Table 2 presents the programs that were found to be available in each state at a rate that was significantly higher than the norm among the seven states included in this study. This does not imply that the program is available in a majority of the state's school districts, for that often is not the case. It does indicate which programs local school districts in each of the states seem to have adopted to a higher degree than is typical in the region. This information may be useful in looking at the compatibility of state-level initiatives with LEA activities within particular states.

The LEA study reveals that the presence of incentive activities in many cases correlates positively with school district population and also with the level of teacher salary offered. Apparently, larger and more affluent districts have an advantage in being able to offer incentive programs, while smaller and less affluent districts may be the ones which have the greatest need for such plans (Dorman, 1987). It may be an appropriate role for the states' policymakers to provide some equalization of incentive opportunities, much as they do for general fiscal support of the schools. NCREL asked school districts to submit their teacher salary schedule as a part of the LEA study. The mean salary offered within each state at selected points on the salary schedule is presented in Table 3.

Table 3: Mean salary for teachers at selected salary schedule points.

State	BA + 0	BA + 5	BA top	MA + 5	MA top	District top
Illinois	15911	18371	23561	20138	28213	30222
Indiana	16272	18408	21930	20083	28994	29684
Iowa	14448	16717	20798	18346	24044	25004
Michigan	17091	21118	28286	23093	31893	33363
Minnesota	18311	20211	25810	22478	30268	21960
Ohio	15883	19286	26080	21595	30126	31720
Wisconsin	16745	19825	24905	21877	28582	30211
Total region	**16255**	**19037**	**24578**	**20987**	**29084**	**30716**

Based on 1986-87 school district salary schedules submitted as part of the NCREL survey of LEA incentive programs. N for total region = 386

It is difficult to assume too much about actual salaries paid to teachers merely by looking at the schedules, as the percent of teachers at different steps of the schedule will vary from case to case. Information on the salaries available to teachers in the region has been examined in two other ways. The first is the range of salary available within a given LEA, from entry-level BA with no experience, to the topmost salary available. This would be a way of indicating the amount of increase above the entry-level salary individuals can expect if they commit themselves to a lifetime career in classroom teaching. Additionally, we can indicate the amount of salary incentive available to teachers at the top salary paid for masters degree holders through coursework beyond the masters level. In some districts, no lane on the salary schedule for increased education beyond the masters level exists, while in others there are several lanes beyond the masters degree, perhaps even extending to the Ph.D. This level of salary increment would be meaningful especially to veteran teachers who may no longer be receiving annual increases for experience and already have earned their masters degree. These two indicators of salary incentive are presented in Table 4.

Table 4: Indicators of salary increments available in LEAs by state in the NCREL region.

state	mean salary range within LEAs	mean available increments beyond MA
Illinois	14302	2037
Indiana	13411	759
Iowa	10516	960
Michigan	16271	1470
Minnesota	13302	1693
Ohio	15837	1594
Wisconsin	13466	1629
Total region	**14419**	**1653**

Based on 1986-87 salary schedules submitted as part of the NCREL survey of LEA teacher incentive practices. N for the region = 386

Examining these indicators of mean teachers salary can provide some insight into which monetary incentives are provided in each of the NCREL states. However, certain cautions must be taken in looking at this data. By looking at means, we overlook the range which exists within a given state. Also, there are variations in the cost of living both among and within the states, particularly between rural and urban areas. States which are more urbanized will have more districts where the cost of

living is high. As stated above, we must also remember that the range of salaries offered on the written salary schedule is less meaningful than the actual placement of teachers on the schedule.

Conclusions

The seven states in the NCREL Region have among them some common features that lead to some consistency in the interventions taken by state policymakers to provide incentives for teachers in their respective state's public schools. These common features include a decade of enrollment decline, a trend which has begun to slow down or reverse itself; continued increases in the number of new teachers hired; a tradition of local autonomy in school district administration; and a depressed economy, with the heavy manufacturing and agricultural sectors both remaining weakened.

There is, however, a great deal of diversity in the types of programs the NCREL states have embarked upon. We find state-supported pilot programs, teacher induction programs, incentives for teachers in areas of critical needs, award and recognition programs, establishment of minimum salaries and funding for performance-based pay plans, teacher participation in state advisory groups, and more. In some cases the state interventions fill gaps in the array of incentives offered by local school districts, while in others the state programs are intended to support or complement local activities.

Continued attention is likely to be paid to teacher incentives as we place ever-increasing demands on our education system, demands that address concerns which are as much economic, political, and social in nature as they are academic. For this system to succeed in meeting these demands requires a continuing effort to recruit, retain, develop and enhance the most highly capable and dedicated people into the teaching profession.

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Legislative and State Education Agency Perspectives on Educational Reform in Teacher Incentives

An Introduction

by

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An Introduction

State Reform Efforts

Reform measures in education have abounded at the state level in recent years. One area that has received considerable attention in current reform efforts is the teaching profession itself. Concerns about the quantity and quality of the teacher workforce have generated some important questions: Will we have enough well-qualified, highly-motivated individuals who will be willing to enter and remain in the profession? Is the current workforce encouraged to perform up to its potential and rewarded for outstanding performance? What can be done to attract, retain, and motivate a competent teacher workforce of sufficient size to staff the schools in our states?

A variety of state-level initiated teacher incentive plans have been introduced all over the nation to address these concerns. The present discussion is focused on the role of the State Education Agencies (SEA) in the planning, development, and oversight of reform initiatives relating to teacher incentive programs. Particular emphasis is placed on the region represented by the North Central Regional Educational Laboratory (NCREL), which includes the seven states of Iowa, Indiana, Illinois, Ohio, Michigan, Minnesota, Michigan, and Wisconsin.

For the past two years, in cooperation with the University of Iowa, NCREL has been conducting research related to incentives for teachers. A number of reports have been issued, and others are forthcoming. The research began with an examination of plans being considered, implemented, and evaluated in states and localities throughout the nation. The impact of national reform efforts was also examined. The next step involved a review of the statewide reform efforts in the region. A follow-up study of local school districts examined what was happening at the local level through the use of a survey instrument. Sites were then selected for further investigation, forming case studies for in-depth analysis.

The discussion today is devoted to an examination of the states' role in establishing incentives for teachers within their own boundaries. However, the national impact cannot be ignored. Likewise, the local responsibilities for incentives and responses to statewide policies cannot be dismissed. The context for state-level reform efforts goes well beyond what happens in the state legislature or the role of the SEA in implementing such reform measures.

What are Incentives?

An incentive is that which induces, motivates, and encourages participation or performance. It implies an external influence that would offer something desired in order to produce a certain behavior (Bartell, 1987). Incentive planning, therefore, requires that consideration be given to what it is that motivates teacher behavior. What is it that induces, motivates, and encourages persons to select teaching as a career, remain in the profession, and continue to grow, develop and improve their skills?

Incentives as inducements to behavior are highly subjective and value-related. What serves as a motivator for one person or group of persons does not always become an incentive that would motivate another; if one does not value something, the possible receipt of it can hardly be a motivator. Incentives can be strongly or weakly valued or fall somewhere along a continuum. Incentives may complement or compete with one another. If one has many reasons for acting a certain way and few reasons to exhibit opposing behavior, that person is most likely to behave in a manner that satisfies the dominant motivational factors.

The Need for Incentives

Many recent reports have predicted an impending crisis in the teaching profession (Darling-Hammond, 1984; Holmes Group, 1986; Schlechty & Vance, 1983; Task Force on Teaching as a Profession, 1986). These reports express concerns about the quantity and quality of candidates seeking to teach and about the morale and performance of the current workforce.

Fewer academically able students are selecting education as their academic majors (Darling-Hammond, 1984), and the most talented among them are the ones most likely to leave the profession (Lyson & Falk, 1984; Pavalko, 1970; Tierney & Bond, 1985), often within the first five years of their careers (Pederson, 1970; Schlechty & Vance, 1983).

Other problems associated with the impending teacher shortage relate to the unprecedented number of teachers who are nearing retirement age. The average age of American teachers is now about 42, and it is predicted that in the next five years, up to 40 percent of the current teaching force will retire or leave the profession (Hanes & Mitchell, 1985; NEA, 1983).

Predictions based on statistics gathered by the National Center for Education Statistics indicate that by 1992, if present trends continue, there will be 283,000 fewer teachers than there are positions available (Plisko, 1984). Some districts already report shortages in certain curricula areas, such as physics, computer science, bilingual education, and special education.

Some would contend that these needs can be partially met with former teachers who will reenter the profession once positions become available. It is difficult to estimate how many former teachers who were unable to find work or who were subject to reductions in force during times of over supply and declining enrollments actually will return to teach. The majority will not, according to a survey of former teachers (Harris & Associates, 1985).

The old incentives are increasingly ineffective, especially for women and minorities who now have many more career options than they have had in the past (Schlecty & Vance, 1983). In addition, only 70 percent of those who are trained to be teachers actually do teach (Cresap, McCormick and Paget, 1984).

Many teachers report that they would not select teaching as a career again, nor would they encourage others to do so. Almost half of all teachers in an NEA survey claimed that if they had it to do over again, they would not enter the profession (NEA, 1983); this represented a five-fold increase over a twenty-year period. A similar percentage would be reluctant to advise their own children (Gallup, 1984) or any other young person (Harris, 1985) to become a teacher.

According to evidence presented by (Sykes, 1983) public school teaching has lost more occupational prestige in the past 15 to 20 years than any other occupation ranked in the polls. Half of all teachers themselves feel that students, parents, and the society at large no longer respect them (Harris, 1985).

The conditions under which teachers work more often serve as a disincentive rather than an incentive to remain in the classroom. These conditions have been described as follows:

> ... Teaching is honored and disdained, praised as "dedicated service", lampooned as "easy work" ... Teaching from its inception in America has occupied a special but shadowed social standing ... Real regard shown for those who taught has never matched professed regard (Boyer, 1983, p. 154).

> ... The surroundings in which many teachers work, especially in our large urban schools, would turn any other workplace into a shambles ... Recruiting for the profession is hampered by the average rate of pay, which is often less than that in other taxing lines of work ... We also fail in this country to give (teachers) the respect that the worth of their service to the community deserves ... Add to this all the many administrative, public relations, and quasi-menial duties that take mind and energy away from teaching, it is easy to understand why our educational system is not able to attract many of the ablest young into the teaching profession (Adler, 1982, p.. 57-58).

... Too many of the conditions now current in schools limit what teachers can do rather than amplifying teachers' abilities (Green, 1986, p. 22).

... Elementary and secondary school teachers are expected to act like professionals, but they are not treated like professionals. As a general rule, they are not involved in meaningful discussions and decisions on matter that directly affect their classroom work, such as curriculum, textbooks, instruction, and grading (ASCD Task Force, 1985, p.12).

... The problems of teacher education mirror society's failure to treat teaching as a profession. If the rewards, career patterns, working conditions, and professional responsibilities of teachers indicate a second-class occupation, then candidates for teaching and teacher education will tend to follow those expectations (Holmes Group, 1986, p. 61).

The Intent of Incentives

Quantity concerns and quality concerns are of equal importance in addressing incentive planning. Teachers must be recruited in sufficient numbers to fill existing needs. Yet those teachers, in order to provide the best education available for the children in our states, must be those that are well-trained, competent, and most able to motivate and encourage educational growth and achievement.

In order to remedy the problems of the teaching profession described above, a number of incentive plans have been suggested to make the profession more attractive and rewarding. When designing such plans, it is important to decide what behavior one wants to promote or the outcome one wishes to produce in response to the offering of the incentive. What is the intent of the plan? The intent of incentive plans as outlined in this paper include:

- the attraction of competent and talented individuals to the teaching profession
- the retention of superior teachers
- the improvement of teacher performance
- the enhancement of teaching as a profession

It may be helpful to think of the intent of incentives as hierarchically arranged. Attraction is the first step, after which the focus is on retention of the best candidates. The efforts then need to be on continued improvement with the final step being enhancement of the individual's role and contribution to the profession. Different

incentives will appeal at different stages. Enhancement of teaching as a profession is the ultimate goal of all incentive plans. If more, talented persons are attracted to teaching, if those persons remain committed to the profession and are given opportunities to grow and expand within their roles as teachers, then indeed, the profession will be enhanced.

What Do Teachers Want?

Current incentive plans assume that teachers want the following things out of their profession:

- they want to be compensated adequately
- they want to achieve a certain level of professional status
- they want to be recognized for their achievements
- they want to assume gradually increasing levels of responsibilities
- they want the conditions under which they work to support their performance

Such incentive plans must also be viewed in terms of the needs of schools and of society. Community needs dictate that incentives must be provided to attract competent individuals who are trained in appropriate areas. A workforce must be provided to work in all geographic locations and in a variety of settings. These individuals should demonstrate a willingness to grow professionally and to assume increasing levels of responsibilities as they prepare students for an increasingly complex society.

Incentive planning, therefore, involves finding ways to provide what is desired by those who teach or would teach with the resources available and within the existing constraints to meet existing demands of society.

Types of Incentive Plans

A wide variety of incentive plans can be found across the nation and in this particular region. Plans differ in intent and in what is conceived as the teacher motivators listed above. Some general categories of plans are reviewed here; however, even within categories, plans differ in their design and implementation.

The first category of plans revolves around monetary compensation. Teacher salaries can be adjusted to make entry and longevity in the profession more attractive. The range and choice of collateral benefits may improve. Market-sensitive pay has been suggested as a way to attract teachers into critical shortage areas or to specific locations. Bonuses can be provided to reward outstanding teacher performance or for other purposes. Grants, sabbaticals, and pay for additional training could be a monetary incentive, although there are other incentives involved here. Another modification in the traditional pay scale is the design of differing salaries based on job factors, or a "comparable worth" scheme. Pay for superior performance, or merit pay is another plan that has been tried.

The second type of plan attempts to change professional status in some way. It offers opportunities for teachers to advance within the teaching profession. Career ladders, or career development plans, offer this opportunity. The most competent teachers are selected to move up to a new status or level and assume different or additional responsibilities. Additional responsibilities may include such things as working with beginning teachers, conducting staff inservice activities, developing curriculum, acting as a peer evaluator, becoming a grade level or content area supervisor, or any number of tasks. Other plans to raise status can be directed toward raising the status of all teachers by giving them more visibility, more input into decision making, and recognizing their achievements.

The third type of plan focuses directly on the awards and recognition described above (which may also change the status of teaching.) Recognition programs include teacher of the week/month/year sorts of programs, awards and recognition for special achievement, favorable press coverage, grant awards for instructional improvements, one-time bonuses for effective performance, teacher-appreciation dinners, and verbal recognition of teacher accomplishments.

A fourth type of plan addresses professional responsibilities that may serve to motivate teachers. Mentor or master teacher plans would fall into this category. Here teachers are given the opportunity to assume a new role and share their own knowledge and experience. These opportunities may or may not carry increased remuneration and they do not necessarily change a teacher's status. Other expanded responsibilities include special projects developed and implemented by teachers themselves, summer employment opportunities within or outside of the teaching profession, or attendance and participation in professional meetings. Ongoing opportunities for real professional growth and development are important.

Perhaps the most comprehensive type of plan is the fifth area to be addressed, the conditions of the workplace. Teachers need a supportive environment, including support from peers, supervisors, administrators, parents, and school board members. They need to have a role in decisionmaking. They want to be represented on committees and commissions, including those at the state level. Class size and course loads need to be addressed. Appropriate and sufficient instructional materials and supplies should be provided. Discipline problems need to be addressed. Non-instructional duties should be reduced. Work space and preparation assistance should be provided.

Incentive planning, then, involves giving attention to a wide range of motivators that attract, retain, and encourage teacher participation and performance. Incentives should be designed to match the motivator with the intent of the plan. A matrix is presented in Figure 1 which presents a framework for the examination of the interaction of teacher motivators and intent of incentives.

The intent of incentives is based on what concerns need to be addressed. If, for example, a particular school district began to experience a shortage of qualified applicants for teaching positions, attraction would be the immediate phase of concern. If it is believed that monetary compensation is a strong motivator for those entering the teaching profession, and the intent was to recruit outstanding candidates, one would offer the highest beginning salary that was possible, provide a bonus amount for signing an early contract, or pay the first month apartment rent for the new teacher. If one chose to believe that professional responsibilities were the strongest motivator, the emphasis in recruitment would be different. The recruiter would then focus on the nature of the job itself and the opportunities available for professional advancement or diversity. The most comprehensive approach to recruiting new teachers would be to plan to address all possible motivators that could stimulate teachers to enter, remain, and continue to develop and grow within the profession.

As was stated earlier, usually more than one motivator is considered in the building of incentive plans. The framework as presented does not mean to suggest that any given plan will address only one cell of the matrix. In fact, it is more realistic to consider that a wide range of motivators will predict and influence teacher behavior. The framework should not be used to fit a specific plan into an individual cell. It can be used to examine instead how each cell is addressed in a proposed incentive plan.

	INTENT			
	attraction	retention	improvement	enhancement
MOTIVATOR				
monetary compensation				
career status				
awards and recognition				
professional responsibilities				
conditions of the workplace				

Figure 1. A Conceptual Framework for the Examination of Teacher Incentive Plans

The most comprehensive plans will address as many cells as possible, including various factors that are felt to motivate teachers and serving a wide range of purposes or intentions. Reform will not occur if the plan is narrowly conceived and adopted. Piecemeal approaches to incentives will only provide temporary solutions and will not, in the long run, enhance the profession.

State Level Responsibilities

Much of what can be done in the area of incentives for teachers takes place at the local level. What, then, is the state-level responsibility in this area?

State-level policies can play a major role in the development of incentive plans. Legislation has been passed in a number of states mandating or permitting the establishment of such plans along with providing funding for certain kinds of incentive plans in school districts. In addition to providing a legal framework, state government can provide leadership in the development of such plans by providing seed money, technical assistance and training to local school district personnel.

Other state laws and policies can have an impact on the development of incentive plans by local school districts; such factors can serve to encourage or to constrain the development of teacher incentive plans. State laws addressing collective bargaining, tenure rights of teachers, compensation of teachers, and evaluation of teacher performance will determine what states and local school districts must consider in the design of such plans.

The State Education Agency has the responsibility to see that reforms initiated by the legislature are implemented in the school districts within the state. These agencies provide communication and articulation between legislative action and school district initiatives and response.

The next speaker will review the recent legislation related to teacher incentives in the NCREL region and will examine local initiatives and response within this context. This will be followed by a panel discussion devoted to specific policy issues that have arisen in the adoption of major reform efforts in three states within the region -- Iowa, Indiana, and Ohio.

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